

Request for Proposals:

Diversity, Equity and Inclusion Implementation Consultant

for

Agency of Human Services (AHS);

Department of Disabilities, Aging and Independent Living (DAIL);

Division of Vocational Rehabilitation (DVR)

Schedule of Significant Dates

RFP Posted	July 8, 2021
Bidders' Questions Due	July 30, 2021 at 4PM EST
Pre-Bid Conference	August 2, 2021 at 10:00AM EST
Department Response to Questions	August 9, 2021
Proposal Due/Closing Date	August 23, 2021 at 4PM EST
Bid Opening	August 24, 2021 at 10:00AM EST
Selection Notification	September 7, 2021
Commencement of Contract	October 27, 2021

PLEASE BE ADVISED THAT ALL NOTIFICATIONS, RELEASES, AND AMENDMENTS ASSOCIATED WITH THIS RFP WILL BE POSTED AT: <http://www.vermontbidsystem.com>.

THE STATE WILL NOT ATTEMPT TO CONTACT VENDORS WITH UPDATED INFORMATION. IT IS THE RESPONSIBILITY OF EACH VENDOR TO CHECK <http://www.vermontbidsystem.com> PERIODICALLY FOR ANY AND ALL NOTIFICATIONS, RELEASES AND AMENDMENTS ASSOCIATED WITH THE RFP.

Sole RFP Contact:

James Smith, Deputy Director
 Division of Vocational Rehabilitation
 280 State Drive - HC 2 South
 Waterbury, VT 05671-2040
 802-279-3713
james.smith@vermont.gov

This RFP is available in alternate formats upon request.

TABLE OF CONTENTS

A. INTRODUCTION..... 3

B. PURPOSE OF REQUEST 4

C. CONTRACT TERM AND DOLLAR VALUE 6

D. SPECIFICATIONS OF WORK TO BE PERFORMED 6

E. CONTRACT SPECIFICATIONS..... 7

F. PROPOSAL SUBMISSION REQUIREMENTS 7

G. AMENDMENTS..... 10

H. BID OPENING..... 10

I. RECEIPT OF INSUFFICIENT COMPETITIVE PROPOSALS..... 10

J. NON-RESPONSIVE PROPOSALS..... 11

K. REJECTION RIGHTS..... 11

L. AUTHORITY TO BIND DAIL..... 11

M. PROPOSAL REVIEW..... 11

N. SCORING..... 11

O. SELECTION CRITERIA 12

P. NOTIFICATION OF AWARD..... 12

Q. PUBLIC RECORD: BID PROPOSALS..... 13

R. CONFLICTS OF INTEREST..... 13

S. ATTACHMENT 1: Current State of Vermont Customary Provisions for Contracts and Grants..... 14

A. INTRODUCTION

The State of Vermont, Division of Vocational Rehabilitation (DVR) is a statewide direct service organization within the Department of Disabilities, Aging and Independent Living (DAIL) in the Agency of Human Services (AHS), jointly hereafter “State.” DVR provides employment and career development services for Vermonters with disabilities. The purpose of the DVR program is to assist Vermonters with disabilities attain high quality employment and pursue career pathways. We see helping people achieve good careers and financial stability as social justice work. Employment is empowering for people with disabilities. The program is totally voluntary, people seek our services because they want to, not because of any mandate. We help DVR consumers explore employment and career options through career assessment, counseling, and guidance. We use our extensive networks in the employer community to create job opportunities, match employer needs with jobseeker skills, and help employers retain staff with disabilities. We offer consumer’s extensive post-secondary training and education options to achieve industry recognized credentials. We believe credentials are the key to higher wage and higher quality A complete description of the DVR program can be found at the following website: <https://vocrehab.vermont.gov/>.

Vermont DVR is not a traditional State Agency. DVR has been recognized as one of the most innovative and forward-looking vocational rehabilitation agencies in the country. The values and mission of the independent living movement are embedded in our culture. DVR is strongly aligned with the Vermont Center for Independent Living Center (VCIL) and their mission to promote the dignity, independence and civil rights of Vermonters with disabilities About - Vermont Center for Independent Living (vcil.org). We see employment as a critical component of independent living movement.

As an organization, DVR is made up of approximately 130 State classified employers and 80 contracted staff co-located within DVR offices. Of the 130 State classified employees, about 75% are women and 4.5% are minorities based on the current methodology for collecting this data. The Vermont population overall is 50.5% women and 6.2% minorities. The following table provides a general demographic summary of the people the program serves:

Total Number, Age, Sex and Racial/Ethnic Demographics

All Closed VR Cases by Population Characteristics	SFY 16 Closures	SFY 16 Percent	SFY 19 Closures	SFY 19 Percent	% Change In # of Closures	Change In % of Closures
All Closures	4207	100%	3117	100%	-35%	0%
Sex						
Female	2024	48%	1359	44%	-49%	-5%
Male	2181	52%	1733	56%	-26%	4%
Other	2	0%	20	1%	90%	1%
Age at Application						
Under 25	1,341	32%	977	31%	-37%	-1%
25-44	1597	38%	1118	36%	-43%	-2%
45-64	1172	28%	920	30%	-27%	2%
65+	97	2%	102	3%	5%	1%
Minority Status						
Racial / Ethnic Minority	192	5%	246	8%	22%	3%
White	4015	95%	2871	92%	-40%	-3%

The DVR program does not have a means test. However, a high proportion of people DVR serves are low income. Poverty and lack of resources can be an additional barrier to employment. About 30% of DVR consumers receive Supplemental Security Income (SSI) or Social Security Disability Insurance (SSDI) because

of the severity of their disability. The SSI and SSDI programs include complex rules around employment which can present a barrier to work. DVR has a cadre of benefits counselors to assist beneficiaries negotiate these rules.

About 20% have been involved in the criminal justice system and face additional barriers to employment because of a felony record. A high proportion of employers conduct criminal background checks and many will not hire individuals with a record. DVR has a specialized cadre of counselors to support offenders return to work. DVR also has a counselor who connects with offenders while still in the facilities to facilitate transition into DVR services.

DVR serves people with all types of disability with the exception of the blind and visually impaired (The Vermont Division for the Blind and Visually Impaired serves that population). The following chart outlines the broad types of disability:

Disability Type, Presence of Substance Abuse Issues, and Order of Selection Category

All Closed VR Cases by Population Characteristics	SFY 16 Closures	SFY 16 Percent	SFY 19 Closures	SFY 19 Percent	% Change in # of Closures	Change in % of Closures
Disability Group						
Cognitive	1010	24%	712	23%	-42%	-1%
Mental	1596	38%	1171	38%	-36%	0%
Physical	1199	29%	778	25%	-54%	-4%
Sensory	222	5%	198	6%	-12%	1%
No Disability noted (no disability determination done)	180	4%	258	8%	30%	4%
Substance Abuse Co-Occurring						
Has Substance Abuse Issue	525	12%	345	11%	-52%	-1%
No Substance Abuse noted	3682	88%	2772	89%	-33%	1%
Significance of Disability						
Most SD	3765	89%	1921	62%	-96%	-28%
SD	257	6%	938	30%	73%	24%
Not SD (On Order of Selection)	5	0%	0	0%		0%

Many people with disabilities face stigma and discrimination. This is particularly so for people with psychiatric disabilities who make up about 38% of the population we serve. The stigma associated with cognitive and psychiatric disabilities is well documented and can be a major barrier to employment.

In recent years DVR has recognized, the demographics of Vermont are changing, and the population is becoming more ethnically and racially diverse. In addition, recent events nationally have demonstrated the impact of systemic racism on people of color. These trends emphasize the need for DVR staff training around racial justice and cultural competency. We know that systemic racism compounds the issues already faced by people with disabilities who are from racially or ethnically marginalized groups.

It is in this context that our agency is looking to commit to Diversity, Equity and Inclusion in all aspects of our program.

B. PURPOSE OF REQUEST

DVR is committed to Diversity Equity and Inclusion (DEI) in all aspects of our program. To that end DVR is interested in contracting with a vendor that can assist the agency implement a comprehensive approach to

embedding DEI in all aspects of our organization and services. DVR has identified five broad areas of work needed to incorporate DEI into our values, mission, services and operations. These are as follows:

1. **Organizational Values:** This will include but not be limited to:
 - a. Reviewing and redefining our organizational values to explicitly include DEI.
 - b. Integrating DEI into DVR's strategic planning.
 - c. Recommitting to DEI as an organization
2. **Governance:** This will include but not be limited to:
 - a. The identification of a senior manager to oversee the development DEI practices into our services.
 - b. Develop a DVR DEI Committee
 - c. Create a DEI Advisory Board
3. **Planning:** This will include but not be limited to:
 - a. Conduct a DEI self-assessment of DVR (we might want to expand on this to be more specific)
 - b. A review of current policies and practices and how they than can be improved to support DEI.
 - c. How to develop a plan to support cultural competency across the organization.
 - d. How DVR can involve staff, consumers and employers in the planning and implementation of DEI work.
 - e. Review demographic data on consumers served by DVR.
 - f. Plan proactively to serve non-English speakers effectively and equitably.
4. **Staff Development:** This will include but not be limited to:
 - a. The development of recruitment and retention strategies that reflect the diversity of the population we serve.
 - b. How DVR can provide consistent DEI training both for new staff and staff who have been with the organization for many years.
 - c. How DVR can incorporate DEI into staff supervision and evaluation.
 - d. How we can support staff develop the knowledge and skills to serve an increasingly diverse customer base.
5. **Organizational Structure:** This will include but not be limited to:
 - a. Assess how welcoming the DVR program is to diverse populations and groups?
 - b. Consider new outreach strategies for DVR to engage everyone in our community but especially marginalized groups.
 - c. What resources are needed to sustain DVR's commitment to DEI on an ongoing basis.

DVR recognizes that this is sensitive and difficult work that requires buy in from management and frontline staff. We also know that poorly designed or implemented approaches to DEI can backfire and undermine the effort. Therefore, DVR is most interested in approaches to this work that are as follows:

1. **Evidence Based:** DVR is most interested in approaches to this work that are evidence based and shown to be effective. For example, the Race Equity and Inclusion Action Guide from the Annie E. Casey Foundation (2015) is one such approach.
2. **Tailored to the Needs of DVR:** DVR is interested in vendors that will invest time into understanding the DVR program and culture and will design their approach accordingly. It is very important that the vendor get to know our people and our organization before proposing specific interventions.
3. **Bidder will demonstrate an understanding of the concept intersectionality:** Intersectionality is a framework of understanding of how race, disability status, religion, gender identity, socio-economic

status, and other social identities overlap and influence an individual's experience with DEI. The intersection of specific characteristics creates unique challenges.

C. CONTRACT TERM AND DOLLAR VALUE

The term of the contract arising from this request for proposal will be for two (2) years, with an estimated contract start date of October 27, 2021. The contract may be renewed for two (2) additional one (1) year terms following a contract performance review and approval by the State. Bidders must provide a cost proposal for the services to be provided.

State anticipates the total Contract costs to be approximately \$60,000 to \$100,000 per year. However, State will accept for consideration, bids that are below or in-excess of this amount.

D. SPECIFICATIONS OF WORK TO BE PERFORMED

Any organization bidding on this RFP must be able to provide the following needed services. If any one of these services cannot be provided, the bid will not be considered.

Deliverable One, Needs Assessment: The selected contractor will conduct a needs assessment of the DVR program and organization within the context for the five broad areas outlined in Section B. In their cost proposal the bidder must outline in detail how they would conduct such an assessment. The assessment may include but not be limited to:

- Focus groups with staff and managers
- Data review and analysis
- Survey work
- Consumer focus groups
- Employer focus groups
- Business process review
- Review of program policy and procedure
- Partner surveys

The needs assessment must be reviewed and approved by DVR before the State can authorize work to begin on Deliverable Two.

Deliverable Two, Project Plan: The selected contractor must develop a plan in close consultation with DVR to incorporate DEI in all aspects of the program and organization. The plan must be based on the findings from the needs assessment and must be tailored to the unique needs of DVR.

The project plan must be reviewed and approved by DVR before the State can authorize work to begin on Deliverable Three.

Deliverable Three, Plan Implementation: The contractor will provide training and consultation for DVR in support of implementation of the plan. The training and consultation will be provided on a *as needed basis* as determined by DVR.

Deliverable Four, Sustainability Plan: The contractor will develop systems and strategies to sustain DEI as part of DVR's ongoing work.

Minimum Requirements

To be eligible to bid for this Contract, applicant must meet all of the following requirements:

- A. The ability to provide services in the State of Vermont.
- B. The selected contractor will be required by the State to carry Commercial General Liability Insurance (\$1,000,000 Each Occurrence / \$2,000,000 General Aggregate), and a minimum of \$500,000 combined single limit in Automobile Liability Insurance. The selected contractor shall carry workers' compensation insurance in accordance with the laws of the State of Vermont. Selected contractor will also be required to accept standard State of Vermont contracting requirements as outlined in Attachments C, D, E and F, included herein. The selected contractor will also be required to sign a Consumer Information and Privacy Rule regarding the Health Insurance Portability and Accountability Act of 1996 ("HIPAA") agreement as part of a State contract, which is also included herein.

Preferred Qualifications

DVR will give preference for bidders with lived experience of diversity, equity and inclusion issues.

E. CONTRACT SPECIFICATIONS

The Contract format will be the State of Vermont Standard Contract for Services, with relevant attachments. The Contract shall set forth the contract term, the required prior approvals, the maximum amount to be paid for the services performed and include a description of the work to be performed, work products to be produced, anticipated timelines, and payment provisions including any performance incentives. Contractor is expected to comply with applicable standard State contract provisions (current provisions appear in Attachment 1).

The Contract shall include terms that explain that the State shall monitor the Contractor's performance in accordance with the terms of the agreement for troubleshooting purposes and to ensure that the contract terms are met, and the funds paid to the Contractor are appropriate for the work performed.

The State reserves the right to waive portions of this RFP, to waive any informalities in proposals, to reject any or all proposals and/or to negotiate terms and conditions of the awarded contract. The State reserves the right to negotiate the specific terms and provisions of any proposal through contract negotiations.

F. PROPOSAL SUBMISSION REQUIREMENTS

- 1. ***Proposal Packet:*** A proposal packet is the entire package of information submitted to State by one (1) bidder in response to this RFP. Each bidder may submit only one (1) proposal packet for this RFP. The State reserves the right to accept or reject any or all proposals. Final selection or rejection of proposals will be the decision of the Commissioner of DAIL, or her designee. If a proposal is selected, the person or organization that submitted the proposal will be invited to negotiate a contract. The bidder must comply with the State Contract, Attachments C: Customary State Contract Provisions; Attachment E: Business Associate Agreement; and Attachment F: Agency of Human Services Customary State Contract Provisions.

a. Required Content: Interested bidders must submit a proposal that includes the following sections:

i. Letter of Submittal: The letter shall include:

- (1) Information about your organization and any subcontractors, to include the name of the organization, names, addresses, telephone numbers, and address of principal officers and project/program leader, and a description of the type of organization you operate.
- (2) A detailed list of all materials and enclosures submitted in the proposal.

(3) Any alternative contract language you wish to propose. If alternate contract language is longer than one page, attach it to your letter in a separate document.

- ii. Qualifications:** Describe the qualifications and relevant expertise of the bidder and include resumes of the individual(s) who will manage the proposed work. Clearly specify which individuals will perform which work. Include a description of similar projects and prior work products. Include at least three relevant letters of reference, representing individuals who are able and willing to describe the bidder's competence and performance.
- iii. Work Plan:** Describe the high-level proposed approach for the method used to address the elements described in Section B and the deliverables in Section D. This narrative must include an affirmative statement that the bidder will be able to meet all of the above requirements.
- iv. Price Quotation and Budget:** The State expects bidders to provide all-inclusive hourly and daily rates for the following:
 - An inclusive hourly rate for remote planning, consultation and training provided virtually on a platform provided by the State.
 - An inclusive daily and half daily date for in person consultation and training in Vermont at a location provided by DVR.

The above rates must include all costs associated with the service including travel, lodging, meals, incidentals and administrative costs.
- v. Insurance Requirements:** Bid submissions must include a written statement confirming that the bidder possesses, or will obtain, the required insurance required by the State as outlined Section D above, and also in State's standard terms for contracts and grants, identified as Attachment C in Attachment I to this RFP.

b. Required Format:

- i.** Proposals must be submitted using no less than 12-point font;
- ii.** Proposals may not exceed ten (10) pages, excluding the State's standard contract attachments;
- iii.** Include your organization's name on each page of your proposal and on any other information you are submitting;
- iv.** Individual resumes or curricula vitae can be submitted as attachments to the proposal and are also not included in the ten (10) page limit;
- v.** Examples of similar work produced by the individual or organization may be included as attachments to the proposal (not included in the ten (10) page limit), or by reference through the use of active website links/addresses within the proposal; and
- vi.** All proposals are to be submitted by email and must be submitted in **.pdf format**. Proposals must include the **scanned original signature** of an individual who is authorized to submit the proposal on behalf of their organization.

c. Required Certifications and Disclosures:

- i. Worker Classification Compliance Requirements:** In accordance with Section 32 of The Vermont Recovery and Reinvestment Act of 2009 (Act No. 54), Bidders must comply with the following provisions and requirements:
 - (1) Self-Reporting: For bid amounts exceeding \$250,000.00, Bidder shall complete the appropriate section in the attached Certificate of Compliance for purposes of self-

reporting information relating to past violations, convictions, suspensions, and any other information related to past performance relative to coding and classification of workers. The State is requiring information on any violations that occurred in the previous 12 months.

- (2) **Subcontractor Reporting:** For bid amounts exceeding \$250,000.00, Bidders are hereby notified that upon award of contract, and prior to contract execution, the State shall be provided with a list of all proposed subcontractors and subcontractors' subcontractors, together with the identity of those subcontractors' workers compensation insurance providers, and additional required or requested information, as applicable, in accordance with Section 32 of The Vermont Recovery and Reinvestment Act of 2009 (Act No. 54). This requirement does not apply to subcontractors providing supplies only and no labor to the overall contract or project. This list MUST be updated and provided to the State as additional subcontractors are hired. A sample form is available online at <http://bgs.vermont.gov/purchasing-contracting/forms>. The subcontractor reporting form is not required to be submitted with the bid response.

ii. Executive Order 05-16: Climate Change Considerations in State Procurements:

For bid amounts exceeding \$25,000.00 Bidders are requested to complete the Climate Change Considerations in State Procurements Certification, which is included in the Certificate of Compliance for this RFP.

After consideration of all relevant factors, a bidder that demonstrates business practices that promote clean energy and address climate change as identified in the Certification, shall be given favorable consideration in the competitive bidding process. Such favorable consideration shall be consistent with and not supersede any preference given to resident bidders of the State and/or products raised or manufactured in the State, as explained in the Method of Award section. But, such favorable consideration shall not be employed if prohibited by law or other relevant authority or agreement.

2. **Bidder Questions:** Any bidder requiring clarification of any section of this proposal must submit specific questions in writing according to the Schedule of Significant Dates set forth on the Cover Page of this proposal. Questions must be e-mailed to the RFP Contact also listed on the Cover Page. All bidder questions must be received by no later than July 30, 2021 at 4:00 PM EST. Any question not raised in writing on or before the last day of the initial question period is waived. Responses to the questions submitted will be posted to the Electronic Bulletin Board website at <http://www.vermontbidsystem.com>, on or before August 9, 2021.
3. **Pre-Bid Conference:** DVR will hold a 'virtual' Pre-Bid Conference meeting on Monday August 2, 2021 at 10:00AM EST via Zoom Meeting. To participate, please use the following link:
<https://zoom.us/j/94204530770?pwd=amM0NXFKNm0zandseJNb0RCRG1EZz09>
 Meeting ID: 942 0453 0770
 Passcode: 743207
 One tap mobile
 +19292056099,,94204530770#,,,,*743207# US (New York)
- The originally scheduled in-person Pre-Bid Conference will be conducted and simulcast with the above Zoom meeting at the Waterbury State Office Complex, Atrium Conference Room A209 - (Cherry A), 280 State Drive, Waterbury, VT 05671. Attendance at the pre-bid meeting is optional. This meeting will